WISCONSIN WOOD
MARKETING BULLETIN
WISCONSIN DEPT. OF NATURAL RESOURCES

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WOOD MARKETING BULLETIN

The Wisconsin DNR publishes the "Wisconsin Wood" marketing bulletin every two months. It serves the timber producing and wood using industries of Wisconsin by listing items: For sale - forest products, equipment and services, wanted - forest products, equipment and services; employment opportunities. There is no charge for the Bulletin or inserting items in it. Only items deemed appropriate to the timber producing and wood processing industries will be listed. Also the Bulletin will feature forest products utilization and marketing news, safety notes, coming events, new literature, tips to the industry, and listing or employment wanted or positions that are available.

If you know of someone who would like to be on the Bulletin mailing list, please ask them to send their name, address and zip code to the return address on the back page. Also, if you have items to list, send in the form or write a letter to the return address on the back page. Repeat listing of items requires a written request each time the item is to be repeated.

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Global Competition – Forest Product Imports Exports "How will it affect your future."

Mark your calendars for February 24th 2004 the Lake States Lumber Education Inc. will be putting a one-day workshop titled Global Competition – Forest Product Imports Exports "How will it affect your future.".

The keynote speaker for this event will be Ed Pepke, Forest Products Marketing Specialist for the UNECE&FAO Timber Branch located in Geneva, Switzerland. He will be talking on the Global Outlook for supply and demand for wood products in the world and how it relates to the lake states. He started his career with USDA - Forest Service in St. Paul, MN as a forest products specialist. He then took a position with the UNECE and FAO in the early 90's. One of his primary duties is the preparation of the UNECE/FAO Forest Products Annual Market Analysis.

Peter Ince an economist with USDA Forest Service, Forest Product Laboratory will discus the Global Trend and Regional Impacts of forest products and the outside factors affecting them. This talk will provide insight into the pulpwood markets and there relationship to demand for fiber. Peter is a nationally renowned economist whose work emphasis has been in the pulp and paper sectors.

Dan Meyer with the Hardwood Review will talk on global markets and trends. In his work at the Hardwood Review he prepares the export report as associate editor. Mr. Meyer also prepares much of the interesting analysis that is in the Hardwood review.

A panel of industry representatives is being put together with an emphasis on people who have knowledge on competition from china. The panel will be made up of representatives from furniture, veneer, lumber and pulp companies. Dan Masters, President Richardson Brothers Company will be representing the furniture industry; Fred Souba, Stora-Enso will be representing the pulping industry; Michael New, .Webster Industries will representing the Lumber industry and Joe Rademacher, Besse Forest Products will be representing the veneer industry.

Scott Bowe, Wood Products Specialist will close the meeting drawing together the information and discussion.

The session will be held at the Best Western, Wausau and registration fee is to be determined. For additional information contact Terry Mace, Forest Product Specialist, WI, DNR (608) 231-9333. To registration or registration information contact LSLA education inc. at (906) 774-6767. The cost of registration is $100, which covers breaks and lunch. Registration after January 15,2004 will increase to $125.

CONGRATULATIONS MTE

Menominee Tribal Enterprises of Neopit, WI, is the recipient of the 2003 Forest Stewardship Award, presented by the National Hardwood Lumber Association (NHLA).

Menominee Head Forest Marshall Pecore and Sales Manager James Kaquatosh were on hand to receive the award Sept. 20, 2003, during the Grand Finale Dinner of NHLA's annual convention, held this year in Atlanta. Ted Rowe, Jr., NHLA's Second Vice President, made the presentation.

The National Hardwood Lumber Association is a nonprofit trade association composed of companies which produce, sell, or use North American hardwood lumber, or provide services to the industry. NHLA was founded in 1898 to establish a uniform system of grading rules for the measurement and inspection of hardwood lumber. Headquartered in Memphis, TN, NHLA today has more than 1700 member companies.

A five-judge panel made up of NHLA board members, academic experts, and industry insiders has selected this year's winner. The five areas considered by the judges for this award are: 1) public education, 2) political involvement, 3) private landowner education, 4) forest stewardship on-the-ground, and, 5) efficient resource utilization.

In presenting the award, Rowe praised the Menominee for striking a balance – making a livelihood from the harvest of timber while remaining stewards of the land for future generations.

"Visitors driving through the Menominee Forest in Wisconsin may believe it to be pristine and untouched," Rowe said. "In reality, it is one of the most intensively managed tracts of forest in the Great Lakes region."

Over the last 140 years, since the formation of the Menominee Reservation, the Menominee have removed more than two and one half billion board feet of sawtimber, yet the volume of standing timber now is greater than in 1854, the year the Wolf Creek Treaty created the Menominee Reservation.

At the time, the American government left the Menominee people with land they deemed to be poor farmland, and it was. But the Menominee turned to timber harvesting as a way of life and a source of steady revenue, always with an eye toward the future. They took a long-term view, you might say: A 150-year planning horizon!

Nowhere else in Wisconsin can you drive for miles and miles of highway lined with nearly 30 tree species, Rowe said, including towering old white pines, 12 distinct habitat types, and a diversity of wildlife and plants.

From the beginning, the Menominee were committed to a management process that would achieve an ongoing balance, year after year, between natural growth and mortality on the one hand, and the production of timber on the other.

The Menominee Nation applies the principles of Sustainable Yield Forest – SYF – to the land it manages. That forest today – easily distinguished from the surrounding farmland when seen in NASA photographs taken from space is a living testimony to the wisdom of a people who are committed to state-of-the-art forestry principles.

In addition to making the best of their own land, the Menominee people are committed to educating people about sustainable forestry. They are happy to arrange guided tours of their land for visitors.

The award itself is a hand-carved bald eagle from national award-winning wildlife artist Dee Moss, of Jackson, TN.

The eagle is carved from the root-wood of a Swamp Tupelo, and is mounted on a piece of driftwood that, in turn, stands on a custom-made walnut base. The eagle was chosen as the award piece because of its significance in the North American landscape and its symbolism of environmental stewardship.

Source: *NHLA Magazine*, October 2003

FOREST PRODUCTS INDUSTRY MUST TAKE BOLD ACTION

By W. Henson Moore, President & CEO, American Forest & Paper Association, President, International Council of Forest and Paper Associations

In my preparation on behalf of the International Council of Forest and Paper Associations (ICFPA) and American Forest & Paper Association, I offered four actions that foresters, scientists and businessmen agree are important to the future of our global industry, and to the future of forests around the world. The ICFPA represents industry in 40 nations. These countries comprise more than 80 percent of the world's paper and 50 percent of the world's wood products output.

First, all forest enterprises world-wide should commit to implementing sustainable forest management practices. ICFPA members have made this commitment by supporting voluntary forest management certification programs. As any SFI program participant can report, such programs involve working with various stakeholders to develop science-based standards that define actions necessary for forest operations to be economically viable while protecting environmental values. Such values include water quality and biodiversity, as well as other societal expectations for forest, such as scenic beauty and community stability.

Currently, 134 million hectares of forestland - most in developed countries – have been independently certified around the world by a variety of certification programs. This represents 3.5 percent of the world's forest. These lands comply with what we all would recognize as credible forest management certification standards of best management practices. Efforts are underway in developing countries to develop standards specific to those regions.

Making this commitment brings other issues to the forefront, such as ensuring that the full value of this work is captured in the marketplace. Gaining marketplace recognition requires a consistent message about the importance of certification that can be understood on every continent. It also requires a consistent message about the importance of certification that can be understood on every continent. It also requires that certification schemes be transparent, highly credible, and not become a thinly veiled trade barrier. This can be achieved by mutual recognition agreements between programs that are substantially similar.

Second, sustainable forest management should be practiced at national levels. This means elimination of illegal logging, which requires governments to pass and enforce laws banning the practice. This issue is a top priority for ICFPA and AF&PA – both groups have adopted similar policies and begun work with various groups including the Congo Basin Initiative and intergovernmental Forest Law Enforcement and Governance.

Many stakeholders are willing to partner with governments in eliminating illegal logging. But their actions are futile without government institutions willing to enforce legal forest operations.

Another important component in developing sustainable practices at the national level is a balanced view of forest resources. Sustainability identifies three basic values for forestland: economic, environmental and social. Too often, well-meaning interests advance the notion that forests should not be harvested for commercial purposes, but instead should be conserved for future generations. In fact, a commercial forest activities and nature conservation complement each other well. Plantations and protected areas in close proximity form a good landscape that achieves each of these values.

Poverty, starvation and a lack of opportunities for economic advancement are serious concerns in some areas, and these concerns can overshadow any forest issues. Sustainable forest operations can be part of the solution by making commercial use of forests in a manner that ensures such resources will be available in perpetuity. Governments can help by offering a secure, predictable and legally structured environment in which forest businesses can operate.

Third, looking beyond the country level, the global community must crate open and transparent communication on our collective effort toward implementing sustainable forest management.

Such an action may require a more structured international approach to create this level of accountability. The forest products industry is ready to talk about what such an approach may entail. The United Nations Forum on Forests and other international bodies deal with forest issues. An important action they are well-qualified to perform is to give markets, policymakers and consumers a clear picture of which governments are enabling and encouraging sustainable, accountable and legal forest enterprises. Such international bodies could also identify locales around the world where that is not occurring.

Where accountability and transparency exist, free trade and competitive markets can have positive influences on sustainability. The marketplace decides whether products meet consumer expectations. Increasingly, those expectations include a level of confidence that businesses are acting responsibly towards the environment and towards individuals. Businesses and sovereign governments have a role in providing the information that society needs to make these judgements. Governments have the added responsibility of making sure that rule of law is embraced and implemented. When these roles are fulfilled, markets within a free trade system will make decisions that encourage sustainable practices.

This leads to my final proposal – broad support for global free trade. Globalization is not something to be feared, instead, free trade allows real capital to flow into regions that need economic opportunity. These regions need that capital to address issues such as poverty, hunger and disease. To exercise economic opportunity, all regions must be able to see what they produce and buy what they need. Free trade permits that to happen.

Our forest products industry has had rough times in recent years. Sustainable forestry is vital for a sustainable industry. By committing to universal sustainable forestry, encouraging governments to enable sustainable forest management within their borders, creating an open and transparent global process to report on our collective progress toward sustainable forest management, and building broad support for free trade, we can assure that forests will be vital, healthy and productive into the future.

Source: *PaperAge*, Nov/Dec 2003.

WAGES IN THE FURNITURE INDUSTRY STILL LAG

According to Aktrin's Report on "*Employment and Wages in the American Furniture Industry*," following material costs, payroll expenses represent the second largest cost component in the furniture industry.

Materials account for approximately 46 percent of the value of shipments while the wages bill – including production wages, nonproduction salaries, social security benefits and other employer employer programs – accounts for 23 percent. The remaining 31 percent represents other costs and profits. Therefore, wages play a significant role in determining the furniture industry's overall profitability.

In 2002 the hourly wage rate in the furniture industry averaged $12.65. This compares to $15.30 for manufacturing as a whole. The only industries with lower average earnings are lumber and wood products at $12.50, miscellaneous manufacturers at $12.40, textile mill products at $11.72, leather and leather products at $10.30 and apparel and other textile products at $9.91.

In 2002, the average furniture employee's hourly earnings were just 82.7 percent of those of the average manufacturing employee, exposing a gap of 17.3 percent. During the past 20 years, this gap has gradually narrowed. It stood at 25.7 percent in 1982.

The relatively low wages in furniture are based on the industry's low labor productivity, the Aktrin report says. Output per worker in the furniture sector now falls short of that among all manufacturers by almost 50 percent. Productivity in the furniture sector decreased compared to total manufacturing throughout the 1980s, particularly from 1984 to 1988. It recovered somewhat from 1990 to 1993, but has deteriorated once again since then.

The average production production worker in the furniture industry in 2001 was paid an estimated $25,219. Within the industry, those with earnings above the industry average included employees in the nonwood office furniture segment ($36,248), the custom architectural woodwork and millwork segment ($29,523), the showcase, partitions shelving and locker segment ($26,700), the institutional furniture segment ($26,032) and the mattress segment ($25,726). At the lowest paying end of the scale are those in the nonupholstered wood household segment (only a but higher at $22,065).

The relatively high wages paid to production workers in then nonwood office furniture sector are understandable since the value added per production worker is higher than in any other sector, the report says.

For more information about this report call 9905) 845-3474, or visit the website at http://furniture-info.com/116.htm.

Source: *Wood Digest,* November 2003

STORA ENSO TO TRIM NORTH AMERICAN WORKFORCE BY 12%

Stora Enso North America said that it will implement a US $65 million (EUR 60 million) reduction in annual fixed costs through an extension of the profit enhancement program announced in August 2002.

The new program includes a reduction in Stora Enso North America's total workforce of about 12% or 700 employees by mid 2005. In addition, 350 of the reductions in the previously announced profit enhancement program remain to be implemented. Stora Enso North America currently employs about 6,050 people. After the workforce cuts, the number of employees will be about 5,000.

As part of this initiative, PM 32 at Stevens Point, WI, which produces 25,000 tonnes of specialty papers annually, and as previously announced, PM 24 at Biron, WI, which produces 69,000 tonnes of light-weight coated paper annually, will be permanently shut down as of September 1, 2003. This will result in the removal of 94,000 tonnes of annual capacity and affect approximately 60 full-time positions.

Stora cited a lagging economy, increased competition from lower-priced imports, higher energy costs, and higher production and labor costs as the determining factors in its workforce and capacity cuts.

Sales prices for paper products in North America also continue to be at historic lows, Stora added.

Stora Enso North America President Lars Bengtsson notes that many changes have already been made. "During the past three years, Stora Enso North America has implemented major cost-cutting initiates, including a 20% reduction in the workforce. We have put a freeze on hiring, placed restrictions on travel and reduced the use of outside consultants. We will implement a freeze on salaried employee wages and will consider cost-effective modifications in the employee benefit program s well as departmental reorganizations," Bengtsson said.

Stora said that workforce reductions will be made in a number of ways, including severance, retirement and attrition, and will be carried out in accordance with applicable collective bargaining agreements.

Source: *Paper Age*, October 2003

IS THE HARDWOOD MARKET ENTERING A NEW ERA?

By William G. Luppold, Ph.D, Northeastern Research Station, Forestry Sciences Laboratory, USDA Forest Service, October 11, 2003

Part I – In the April 13, 2002, issue of the *Hardwood Market Report*, it was rhetorically asked, "Are Hardwood Markets Changing?" In many ways this was a naïve statement as every downside in the hardwood production cycle brings new challenges and opportunities for the hardwood industry. Still, the question many have asked during this current market situation is: are we experiencing another hardwood production cycle, or has the underlying structure of the market changed to such an extent that what we are witnessing is the beginning of a New Market era?

Cycles Versus Eras – For years we have talked about the hardwood cycle and have recognized that market fluctuations facilitate change in lumber marketing and manufacturing processes. Market eras are a long-term concept in which a combination of dramatic national and global economic events causes industry as a whole to reevaluate its competitive position and recognize that there has been a slow but constant change in timber availability and price. This process results in dramatic changes in the method that timber products are processed, distributed, and marketed and ultimately changes hardwood timber demand and valuation. Since 1870 there have been three discernable market eras in the Northern and Appalachian hardwood regions (Figure 1).

While timber has been harvested in North America since Colonial times, the era of heavy cutting began after the Ciival War and continued through the 1920s (Figure 1). What is most interesting about this era is that a considerable volume of the timber harvested in what is now the Eastern hardwood region was softwood. Ironically, the clear cutting of softwood and the land practices after harvest allowed the regeneration of shade intolerant species such as Northern Red Oak and Black Cherry. In fact, much of the Northern Red Oak sawtimber harvested over the last 30 years regenerated during this era.

By the late 1920s continued cutting started to exhaust timber supplies, however, the decline in lumber demand during the Great Depression eliminated the last vestiges of an industry dominated by large band mills in the Northern and Appalachian regions. The mills that operated in the post depression period in these regions were small because merchantable timber was less abundant and tended to exist in fragmented stands. The abandonment of farmland prior to and during the depression also allowed for the regeneration of Yellow Poplar (also shade intolerant) in many areas of the Appalachian hardwood region.

During this second era, selective cutting based on diameter and species was a common practice because the furniture industry preferred long, wide lumber of specific species. This selective cutting resulted in uneven age stands in which shade tolerant species such as Soft and Hard Maple regenerated. The Red Oaks were many times left standing even though it was becoming a major component of the forest by 1960 because these species were not used by the furniture industry.

While the transition between the first and second eras was marked by the Great Depression, the transition between the second and third era was not as well defined. Several events caused the hardwood industry to change including the decline in flooring demand, a spike in the demand for Hard Maple to build bowling alleys in Japan, experimentation with plastic by the furniture industry, Nixon's wage and price controls, and the adoption of floating exchange rates. The most important point that can be learned from the transition period between the second and third era was that hardwood lumber production declined between 1966 and 1970 before slowly increasing between 1970 and 1973 (Figure 2). In fact, one can argue that the market really did not improve until after 1980. This slow transition period was experienced throughout the U.S. economy as government and industries took time to recognize and adjust to a new International market. Some major changes that occurred in the third era was the adoption of Red Oak as a furniture species, growth in International demand, the expansion of kiln drying facilities at sawmills, the re-emergence of large band mills, and a greater emphasis on product quality resulting in increased demand for high-quality timber.

Another Period of Transition – The underlying factors affecting the hardwood market today are different than in the late 1960s, but the prolonged period of uncertain profitability and declining production experienced in the late 1960s s similar to what is occurring in the current market. In essence, the hardwood market has been in a period of transition since 1999, and this transition may continue for several more years. The market and industry that will emerge after this transition may look considerably different, but these differences are difficult to predict because of ingenuity of individual firms. Therefore, it is important to examine several pivotal issues including what is the New Market, the strengths and weaknesses confronting the U.S. hardwood products industry, and potential changes in the production and marketing of hardwood products.

The New Market – The biggest change in the Domestic hardwood industry has been the increase in furniture imports since the late 1990s (Schuler and Buehlmann 2003). While Exports of lumber and veneer have increased to Asia as offshore furniture production has increased, the increase in Exports is less than the decrease in lumber used by the Domestic furniture industry. This trend probably will continue as International producers seek and develop other sources of lumber in Eastern Europe, Russia, and Asia. The resulting market channels established by this activity are not only making the Asian export market more competitive but are causing increased pricing sensitivity for the Global lumber market.

Another new market that has received less attention is Domestic manufacturers that demand fixed width lumber, defect free cuttings, and Color sorts. Many of the firms that require additional processing are being managed under modern business practices that keep per unit cost as low as possible such as lean manufacturing. Many of these firms also are trying to differentiate their products by placing increased emphasis on small production runs and semi-customized products. In the future, semi-custom and cost driven custom operations will probably expand as traditional furniture production practices remain unprofitable.

Traditional U.S. furniture producers have found it increasingly difficult to be profitable when confronted by Asian manufacturers that produce furniture in new factories with low labor costs and fewer safety and environmental regulations. Even with the added expense of overseas transportation and handling. Asian furniture producers have a cost advantage. Another way Asian manufacturers have kept costs down is by adopting the high volume production runs that were the mainstay of U.S. manufacturers for decades. Given this turn of events, there is little wonder why brands of furniture previously manufactured in the U.S. will be manufactured in Asia.

At first glance, it appears that ever-decreasing volumes of hardwood lumber will be sold to Domestic furniture manufacturers. However, there are market factors that may foster a new type of domestic secondary processing industry: direct access to the biggest consumer market in the world and a vast timber resource. The U.S. consumer market is huge but is composed of a diverse group of individuals with divergent tastes. Because of the diversity of taste, many consumers are willing to pay more if a product fits their individual style needs just as long as they don't have to wait too long. Therefore providing new products to these consumers is dependent on understanding their needs and fast production processes.

By redefining furniture into a semi-custom framework and reexamining and refocusing marketing efforts, a new Domestic industry could emerge that specifically exploits the whims of the U.S. customer. For this type of industrial model to succeed, greater consumer involvement in product design (customization) and rapid product manufacturing and delivery may be required.

Existing Domestic furniture producers also may choose to battle low cost Imports by adopting lean manufacturing processes and using lower grade lumber or lumber of lower priced species. This tactic may work, especially in the short-run. This tactic may work, especially in the short-run. Still if these changes are successful, International manufacturers may be able to adopt a similar strategy. This means that innovative marketing efforts may still be necessary for Domestic manufactures that choose to go the lean manufacturing/low cost approach. Innovative marketing could be as simple as a hangtag providing information on the content of material and manufacturing originating from the United States to refined analysis and targeting of specific segments of furniture markets.

Regardless of how the Domestic industry changes. Domestic hardwood lumber manufacturers will probably have to make continuous changes in the way they manufacture and market lumber or other sawn products. The irony of these changes is that there may be a reversal of the needs of Export versus Domestic markets. Over the last 30 years many sawmills have developed proprietary grades and products for the Export market and have continued to sell under NHLA grading rules to many Domestic consumers. In the future, Exports to Asia may be sold under NHLA grading rules while many Domestic consumers might be best served by exceptions to NHLA grading rules in the form of proprietary grades and products because of the adoption of new manufacturing processes. The second part of this article will examine these processes and how changing forest composition and quality may impact the hardwood lumber industry.

POGO WAS RIGHT, BUT NOT TOTALLY

By Steve Ehle, Editor-in-Chief

One of these statements is incorrect as they relate to the U.S. secondary woodworking industry – specifically the residential furniture sector: 1) "We're our own worst enemy." – Joyce Brothers; 2) "We has met the enemy and he is us." – Pogo; 3) "It's all about the customer, not the product." – Anonymous successful person; 4) "If you don't add value, you have no value." – Me.; 5) "It's those damn Chinese." – Anonymous ostrich.

Sorry to be so heavy-handed, but if you didn't choose number five, then I've got a wood lot full of downed red oak and maple that could use some chopping up in preparation for a long, cold winter here in the land of milk and money. But I pay well – hot chili, a warm bed and an iced vessel of "Vitamin V>"

A few weeks ago, I visited a Midwestern furniture manufacturer who is discontinuing nearly all manufacturing, while choosing to serve another market niche. (Yes, it's not just happening in Ol' Dixie). This company has been in business since most of our presidents wore beards. Now they're mothballing most of their factory and laying off more than half their workforce.

Mind you, this well-respected company was going gang-busters just a few years ago, selling its high-quality solid wood furniture out of retail outlets across the country.

Company official's claim over demanding unions had something to do with their decision to close shop. This may have played a part in sinking this once-proud shop. But I'm in no position to say one way or the other.

Either way, in my humble Norwegian-American mind, it's not those low-wage manufacturers from beyond the setting sun who are creating all this havoc here in Bushland. At least not totally. We only have to look in the mirror.

But I'll see the preaching for Sunday. Still, there is an issue that affects – or infects – this entire situation, and that's the monetary policy of the Chinese government. Some U.S. policymakers and labor representatives charge that China's currency is significantly undervalued compared to the U.S. dollar. Some say be as much as 4 percent.

This makes Chinese exports to the United States cheaper, and U.S. exports more expensive than they would be if exchange rates were determined by market forces. It also inflates the United State-China trade deficit like a cartoon balloonist at a birthday party.

I realize this isn't breaking news to most of you. But paint me white and call me rice if this isn't a situation that requires some serious action on the part of our lawmakers in D.C. and others.

Some trade associations, including the Wood Machinery Manufacturers of America (with support from the Small Business legislative Council), are being proactive on this issue. And, legislative steps are being taken, with the Senate passing a Sense of the Senate resolution and the House holding a number of hearings.

More importantly, in a bipartisan move, two U.S. Senators and two Congressmen have introduced strong legislation which would, among other things, require China and other governments to freely float their currencies.

We encourage you to contact your representative in Washington and express your support for two pieces of legislation: Senate, S. 1592 and H.R. 3058 introduced in the House.

If you do, then maybe you'll be seeing a slimmer, buffer, bloated badger boy, thanks to some serious firewood chopping and more time away from the hot chili and iced lighting.

Source: *Wood Digest*, November 2003

PROPHETS OF AMERICAN FORESTRY

By Thom J. McEvoy

Much has happened in forestry since its arrival in North America at the turn of the 20th century, and there are many villains and heroes. Most of the villains are nameless, but the heroes are larger than life. Ask any forester to name just two individuals whose careers have had the greatest impact on forestry as we know it today, and virtually all will name the same two people. Gifford Pinchot and Aldo Leopold. It is ironic that the philosophies exposed by these two "prophets" of conservation were literally opposite sides of the same coin: Pinchot, the utilitarian and politician; Leopold, the poet and academic. One exerted influence by wielding power, the other, ideas. Their careers overlap only briefly, but neither ever mentions having met. Each achieved his legacy by different means; so much so, one if left to wonder how it is they became heroes among foresters of every ilk.

Pinchot was born during the last year of the Civil War to a wealthy family in Simsbury, Conn. He was extraordinarily well educated for the period, with a Baccalaureate of Arts from Yale, two Master's degrees from Yale and Princeton, a Doctorate of Science from Michigan Agricultural College (where he was probably first exposed to ideas about scientific forestry), and no less than four Doctorates of Law from Yale, McGill, Pennsylvania Military College and Temple University. In addition to these 20-plus years in universities of the Northeast. Pinchot is alleged to have been the first American-born student to obtain formal training in forestry in 1900 by attending the National School of Waters and Forests, Nancy, France.

In the midst of his schooling, but before obtaining forestry credentials, Pinchot offered services to woodland owners as a private consultant. His most famous client was the Baltimore family on whose land in North Carolina he completed the first comprehensive forest inventory and management plan. In the same year, he completed forestry training in France (1900), Pinchot is credited with founding the School of Forestry at Yale University and the Society of American Foresters, a professional organization that now represents about 17,000 foresters. A generous endowment from the Pinchot family funded the Yale School of Forestry At Yale University and the Society of American Foresters, a professional organization that now represents about 17,000 foresters. A generous endowment from the Pinchot family funded the Yale School of Forestry, and the curriculum was allegedly dedicated to promoting Pinchot's doctrine of scientific management and the Progressive Era's "gospel of efficiency," according to Samuel P. Hays, author of "Conservation and the Gospel of Efficiency: The Progressive Conservation Movement, 1890-1920."

Owing to his extensive education and, undoubtedly, family connections (but before his formal training in forestry), Pinchot's career was launched when he was selected by the National Academy of Sciences to serve on a forest commission whose purpose was to create a reserve of public forestlands. At a time when "who you know" was fuel for success more so than "what you know," clearly Pinchot had a leg up due to family connections. Nevertheless, he was there at the beginning, and the efforts of his commission led to the Forest Reserve Act of 1897. The legislation formally established federal public forests and created an administration (within the U.S. department of Agriculture) to manage them, and Gifford was at the front of the line.

Sure enough, in 1898, he was appointed chief of the USDA Division of Forestry, later named the Bureau of Forestry. In 1905, the name was changed for the last time to the Forest Service. Despite agency name changes and major transfers of land from the jurisdiction of the Department of the Interior to the Department of Agriculture, Chief Pinchot retained his title. To this day, the principal executive of the U.S. Forest Service assumes the title of chief, and Pinchot is widely recognized as father of the U.S. forest Service. During Pinchot's tenure, from 1898 to 1910, National Forests grew by more than 120 million acres.

After being dismissed by the Taft administration in 1910, Pinchot founded the National Conservation Organization and served as its president to further the cause of scientific forestry in the U.S. In 1920, he went back into public service, this time in Pennsylvania where he served first as commissioner of the Department of Forestry, then briefly as secretary of the Department of Forests and Waters, before serving the first of two terms as governor.

During his varied career of public service, Pinchot authored many articles and speeches on the emerging practice of forestry and the need to conserve forests. He also authored four books. The first, "A Primer on Forestry" (1899), was published a year before he obtained forestry credentials in France. His last and most well-known book is "Breaking New Ground" (1947), an autobiography published a year after he died.
Pinchot was born into a privileged life where any career was available, but he chose forestry. Most of what is known about his career comes from first person narrative, setting the stage for his place in history. He was a humanist and a utilitarian, who fought for the cause of conservation at a time when forest resources in the U.S. were disappearing at an alarming rate. Above all, Pinchot was an egalitarian, who believed that forests in the U.S. were not the property of industry; rather, forests belong to all of us, and it is the job of foresters to yield the "greatest good from forests, for the greatest number of people for the longest time."

Leopold was born in Iowa in Iowa to a family of moderate wealth about 20 years after Pinchot. He was educated at Yale University, a tremendous academic honor for students of families without connections. After completing a Baccalauerate of Philosophy, he entered the newly formed Yale School of Forestry in 1908 to obtain a Master's of Forestry. Without question, Leopold had many opportunities to ponder Pinchot's ideas about forests and forestry, and, in 1909, he followed the path of virtually all newly ordained foresters of his time; he went to work for the U.S. Forest Service as a forest assistant in Arizona.

Leopold's Forest Service career overlaps with Pinchot's by only one year, and there is nothing to indicate the two ever met. Within three years, Leopold was promoted to supervisor of the Carson National Forest in New Mexico, a meteoric rise for a person for his age and experience. Five years later, he as promoted to assistant district forester for the southwest region. It was during this time that Pinchot became an advocate for wilderness, employing the knowledge and skills he learned about managed forests to understanding and appreciating the ecology of unmanaged wilderness. Few foresters today are aware of the fact that the wilderness movement was spawned by one of their heroes, who not only established the first wilderness (Gila Wilderness Area in New Mexico), but he also laid the groundwork for the national forest wilderness system that exist today.

During his early tenure with the Forest Service, Leopold was nearly killed by the elements he celebrated in his writing. While attempting to settle a range dispute in remote New Mexico, he got caught in a "flood and blizzard." He survived the ordeal, but it triggered a serious kidney ailment that laid him up for 18months. Given time while healing to reflect on his c career, Leopold is said to have shifted his energies from forest and timber production to wildlife habitats and game. After moving back east to serve a brief stint as associate director of the Forest Products Lab in Madison, WI, in the mid-1920s, Leopold relinquished his federal appointment to work as an industry consultant, developing a comprehensive inventory of game populations in the north-central states.

In 1932, while earning income as a consulting forester in Wisconsin, Leopold assembled the text for "Game Management," his first book, published in 1933, and the first textbook on that subject. Concomitantly, the University of Wisconsin offered Leopold an endowed chair with the title of professor of Game Management.

During his tenure at Wisconsin, Professor Leopold served many professional organizations, from the society of American Foresters to national Audubon and the American Forestry Association. He was also one of the principal organizers of the Wilderness Society and the Wildlife Society, two groups often at odds with the interests of foresters. He was a dedicated teacher, a passionate speaker and a gifted author. His best known work, published posthumously, is "A Sand County Almanac." IT is a series of essays he wrote, mostly on weekends, at his shack, situated on cutover, abused sand hills of central Wisconsin. The almanac logs Leopold's experiences trying to reclaim his land with native plants, the many failures and few successes dealing with the depredations of mice and the vagaries of climate. In these essays, passages from which are easily quoted by many foresters, Leopold discovers himself and the fundamental challenges that face anyone who attempts to tame natural ecosystems. He died in 1948 fighting a grass fire on a neighbor's land.

The Pinchot experience is that of leadership; the actions of a person who was expected to do great things. He imported the science of forestry to the U.S. and guided its development. He exposed widespread exploitation of forests on public lands and helped create an agency to manage forest as a public trust. His last words published in his autobiography perfectly capture Pinchot's vision: "The right use and purpose of our natural resources is to make all the people strong and well, able and wise, well-taught, well-fed, well-clothed, well-housed, full of knowledge and initiative, with equal opportunity for all and special privilege for none…That is the answer."

The Leopold experience is one of contemplation and circumspection. Events in his life became metaphors he used to explain the workings of the natural world. Few, other than this students and colleagues, knew of Aldo Leopold until his journals were published after he died. One of his best-known essays, "The Lane Ethic," sums up a truth about ecosystems and how humans interact with them."…A system of conservation based solely on economic self-interest is hopelessly lop-sided. It tends to ignore, and thus eventually to eliminate, many elements in the land community that lack commercial value, but that are (as far as we know) essential to its healthy functioning. It assumes, falsely, I think, that the economic parts of the biotic clock will function without the uneconomic parts. It tends to relegate to government many functions eventually too large, too complex, or too widely dispersed to be performed by government. An ethical obligation on the part of the private owner is the only visible remedy for these situations."

Pinchot was widely known, often excoriated by his critics and the press. He retired to a grey limestone mansion in northeastern Pennsylvania, where he wrote his own story about the emergence of forestry. The property, known as Grey Towers, is now owned by the U.S. Forest Service as a Mecca to forestry in the U.S. Leopold was quietly competent, well-liked by all who knew him and virtually unknown during his career. He retired to a shack, where he wrote his version of the emergence of forestry as a series of epiphanies that helped him understand his connections to the natural world. One can only guess what the two would have discussed if they had met.

Source: *Forest Products Equipment*, October 2003

BOB TIMBERLAKE BECOMES ANTIDUMPING COALITION SPOKESMAN

By Susan Lorimor

Galax, VA – As the American Furniture Manufacturers Committee for Legal Trade heads to an October filing date of its antidumping petition, it does so with the newfound support of spokesman Bob Timberlake.

Doug Bassett of Vaughan-Bassett Furniture Co. said the furniture designer and painter will also financially support the 1-company coalition. Timberlake has galleries in Lexington and Blowing Rock, NC, and is just one addition to the coalition. Timberlake ahs galleries in Lexington and Blowing Rock, NC, and is just one addition to the coalition. In recent weeks, American of Martinsville also joined the group, after Lexington Home Brands and Keller Manufacturing left it.

Some of Keller's top management members reportedly left the company, and their departure also marked the business' exit from the coalition. Lexington, said to be enthusiastic when it joined the group, sent a certified letter to the coalition stating it was leaving.

Doug Bassett said the coalition remains strong, and with the addition of Martinsville – the largest contract bedroom furniture maker in the United States – the coalition represents about 50% of U.S. wood bedroom furniture capacity.

Now, with the addition of Timberlake, a well-known member of the industry, the committee has received another boost.

"We are thrilled that on eof our most recognized living artists, and designer of the most successful furniture collection ever, has joined our efforts to ensure that American furniture workers have a fair opportunity to compete with legally traded products," said John Bassett III, CEO and president of Vaughan-Bassett Furniture Co., and another spokesman for the coalition.

Timberlake's association with the committee began more than a month ago when both parties found they had a common philosophy about U.S. furniture jobs. That led to meeting with John Bassett III.

"I really appreciate John taking the time to educate me on the antidumping coalition and its efforts and am sincerely honored they would ask for my support and participation," Timberlake said. "I applaud the coalition's efforts thus far and will do anything I reasonably can to support them going forward in this regard."

Doug Bassett said he expects legal fees incurred with the proceedings of the petition filing to be around $1.5 million. He said the coalition is raising money from member companies and suppliers, and will have no problem paying the bill. Joe Dorn of King & Spalding, a Washington, DC law firm, is the committee's legal counsel.

Wilmer, Cutler & Pickering, also a Washington, DC law firm, represents the Chinese Furniture Manufacturers Committee for Free Trade in their fight against allegations they are selling products in the United States at artificially low prices. The coalition of Chinese manufacturers recently hired the firm.

Source: *Industry News*, September 2003

FOREST CERTIFICATION: ADDRESSING ISSUES, GROWING CREDIBILITY

By Lisa Harbatkin

Would your customers and clients rather save the environment or save their money?

Cost is just one of the questions as wood industry segments work through an evolving – and growing – forest of certification, sustainable forestry and resource conservation programs.

Added costs form obtaining certification can vary depending on factors as varied as the certifying organization involved, wood species, the product, and forest or job location. These may result from the actual cost of obtaining sustainability audits as well as from at least the potential ability to charge more for a certified product.

Yet while cost can be a factor for professional and ultimately retail customers, sorting out the many programs available, their providers and what and how they certify is even more of a challenge.

At least five or six "umbrella" organizations have developed standards and criteria for evaluating sustainable forest management practices. They accredit and work with certifiers which perform audits of forest management practices. Some operate internationally, while some focus on certification in different regions of the world.

Depending on the program and to some extent where it is in its evolution, different programs require first, second and third party certification. They may also have somewhat different requirements in documenting chain of custody from the origin of the wood or wood-derived material, whether in the forest or in materials, to the arrival of the finished product at retail.

These programs reflect growing cooperation among their various stakeholders in industry, environmental groups, government, and consumers all along the product delivery chain.

Sorting Things Out – The American Forest & Paper Association's (AF&PA) Sustainable Forest Initiative (SFI) and the Forest Stewardship Council (FSC also operates internationally) are the key players in the United States.

FSC was formed by representatives of environmental groups, timber users, and traders. Companies joining AF&PA are required to participate in SFI, which is now managed by an independent board. There are companies which are members of both SFI and FSC.

Other North American groups include the American Tree Farm System and the Canadian Standards Association (CSA International). The Pan European Forest Certification Council and ISO 14000 are some of the "umbrella" programs operating in other parts of the world.

To some extent these groups compete with each other, but the overall mood is one aimed at making sustainable forest management workable.

Addressing the U.S. picture, AF&PA spokesman John Mechem says, "Are we competitors with FSC? Yes, we are. They're certifying land. We're certifying land. However, the goal is to sustainably manage forest. In the end both programs are good programs that take us toward that goal."

"We're all committed to forest sustainability," says Michael Washburn, FSC vice president of forestry and marketing. "We're all trying to get unverified, unsustainable and illegal products out of the market. FSC celebrates any effort that moves us in that direction."

Suppliers and customers throughout the industry food chain confront a certain amount of confusion in sorting all this out. Still, it's clear that these programs are having an impact.

Over 100 million acres have been certified under SFI. Much of the FSC-certified land in the United States is in the Northeast and Pacific Northwest.

Alternative Programs – Other programs address other species and materials.
Not aimed at certification as defined by SFI and FSC, programs from the Tropical Forest Foundation (TFF) and the Composite Panel Association (CPA) tackle other aspects of resource conservation, (see box, page 20).

TFF has "stayed clear of the certification issue as such," says executive director Keister Evans in explaining the group's Reduced Impact Logging (RIL) program. "Our focus and our mission is to demonstrate and teach sustainable forest management. We link to certification because any certification program ill have to require implementation of sustainable practices such as those taught by TFF," Evans says.

Tropical forest products coming into the U.S. market are starting to carry labels identifying them as coming from forests whose managers are trained in RIL methods and operating in accord with sustainable practices. Launched earlier this year, CPA's Environmentally Preferable Product (EPP) Certification Program doesn't try to determine the forest origin of recycled materials.

"The purpose of this program is to certify that these products are made from recycled materials, whether or not they come from certified forests," says CPA senior vice president Chris Leffel. Much of the material going into board and panel products, he notes, comes from pallets, demolition wastes and primary wood processing operations making it very difficult to trace it back to its source.

Thirty-one percent of total North American composite board production has been certified under EPP to date, Leffel says. By the end of next year, CPA expects over 50 percent to carry EPP certification.

Cooperative Efforts – Environmental organizations and industry commitment to responsible forest management have been major factors driving inception and growth of certification programs. Government environmental initiatives have played central roles as well.

In part due to pressure from the environmental/governmental players, industry customers have been equally active, in their purchasing policies and job specs, in urging adoption of conservation measures.

Retail consumers are far less aware, and by most indications, less likely to question the source of the wood products they're buying as they make their purchases.

"There's a growing awareness of certification, but it's still a niche," says AF&PA's Mechem of the retail marketplace. Architects and building sectors are much more aware of the programs and the reasons for them.

At this point, says FSC's Washburn, "the rationale for certification is not about the retail customer. It's about how companies talk to each other and their customers."

Eventually, as happened with products like airbags, he suggests, the awareness and concerns will reach the retail consumer. Home Depot and some other retail businesses have already made their interests clear.
Certifying organizations and wood industry trade associations are also working with each other to try and ensure that the programs can work for their products sectors.

The Kitchen cabinet Manufacturers Association (KCMA), American Furniture Manufacturers Association (AFMA), Hardwood Plywood Manufacturers Association (HPVA), Architectural Woodwork Institute (AWI) and the National Association of Store Fixture Manufacturers (NASFM) are among the groups of sustainable forestry practices among their members and their target consumers.

AWI presented its finalized sustainability statement at its fall annual meeting. The summary stated AWI's commitment "to ensuring the perpetuation of our world's forests for future generations who will benefit from a natural resource that flourishes from sound stewardship practices."

At the same time, companies in all these industry sectors can face problems in dealing with certification. They range from how to select a certifier to the inability to get certified materials in the species and grades required by architects or demand in the market.

Research Planning – Certifying groups acknowledge these concerns. But they also assert that many, if not most, problems can be overcome with good research and good planning.

"Each company needs to look into its needs to determine which certifier to use," Mechem says. "It's our belief that companies should keep an open mind and accept any credible certifying program."

Often, Washburn says, the solution to availability problems lies in allowing for adequate lead time. "These products are in the marketplace. If you put the spec out in advance, you'll get the material."

Labeling is a central aspect of all this, and one that goes beyond the certification process itself. Suppliers and customers at each step in the distribution chain must make decisions about what they're buying and how they're presenting it in their warehouses or retail locations.

"Throughout the chain, the label is the way to tell if you have a certified product," Mechem says. "If you are the mill, you must decide if you'll label the lumber. If you're the lumberyard, it's up to you to decide if you'll only accept labeled and/or certified lumber – and then likewise up the chain."

Ultimately, Washburn says, certified woods "are like any other product in the market. If your customer wants it, you have to find it. It's a tool for a company which wants to out compete other companies in its market. We don't drive that. We're another tool in the toolbox."

Source: *Wood Digest*, October 2003

CONGRESS HEARS FROM FURNITURE INDUSTRYON CHINA'S CURRENCY POLICY

By Chris Pearce

For the second time in as many months, an AFMA member company executive presented testimony on Capitol Hill on an issue affecting the competitiveness of domestic furniture manufacturers. On June 25, Edward M. Tashjian, Vice President of Marketing for Century Furniture, told the House Small Business Committee that China's currency manipulation unfairly places American manufacturers at a competitive disadvantage, and threatens the continued viability of domestic production.

AFMA has joined leading manufacturing groups in expressing concern that by not allowing the market to determine its currency exchange rates and by keeping its currency, the yuan, intentionally undervalued, China has gained a competitive advantage for its exports.

Mr. Tashjian's testimony called on Congress and the Administration to pressure China to end these practices and allow its currency to be set by the marketplace.

"By pegging the yuan to the dollar, an exporting nation like China has in effect undervalued its currency by as much as 30 to 50 percent. This is tantamount to a 30 to 50 percent tariff on U.S. products in our own marketplace. The World Trade Organization and the International Monetary Fund have clearly stated that currency manipulation, done to gain an unfair competitive advantage, is illegal in the global trading system. Therefore, it is vitally important that U.S. trade authorities monitor and enforce China's obligations in this area, and ensure that the timetables for action embodied in the WTO agreement are met. Free trade must also be fair and legal trade, and I would urge this panel, as well as the Bush Administration, to stand firm in the pursuit of fair valuation," Tashjian told committee members.

The Small Business Committee's hearing on foreign currency manipulation was one in a series of hearings examining challenges facing both small and medium-size domestic manufacturers.

Source: *Industry News*, September 2003

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If you wish to use the facilities of the Bulletin, forward a letter, post card or form on page 11 with detailed description of your "wanted" or "for sale" items. All forest products (stumpage, logs, pulpwood, posts, poles, trees and lumber, etc.) and services (custom sawing, custom kiln drying and tree planting, etc.) may be listed. Please be sure your full name, address (including zip code), telephone number accompany your listing, there is no cost for listing any items. If you want items repeated in the next issue, send in a written request. If you have comments about the Bulletin or have suggestions on its content, write to: Forest Products Specialist, 3911 Fish Hatchery Road, Fitchburg, WI 53711, phone (608) 231-9333 FAX (608) 275-3338.

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